

Future Contracts

This is a brief “cheat sheet” to help you create future contracts for your current and incoming housestaff. Using this feature, programs will identify residents who need contracts for the upcoming year (called “create future contracts”) and the GME Office will use this data to print and distribute the actual contracts. Programs will not be required to export, merge, or print.

More detailed information can be found in the New Innovation Help section:

https://rms1.newinnov.com/NIHelpNew/personnel/pd_contracts_future.htm.

In addition, there is a 10-minute webinar which is very helpful. This can be found from the Welcome Page – select Help > Webinars > Personnel Data > How to Create Future Contracts.

STEP 1: Verify that correct information is contained in Personnel Data

For Reappointments:

- While Personnel Data should be complete, please review to insure accuracy and/or that any changes that have occurred are reflected.
- In particular, verify and/or edit Advancement Information for the following:
 - **Off-cycle residents** – If residents are promoting on a date other than 7/1, Advancement Date should be the actual date of promotion.
 - **Residents changing programs** – enter new program in Next Program.
 - **Residents completing training** – enter either Alumni (leaving VCUHS but not completing the full program) or Faculty in Next Status. (See information below on Manage Contracts > Update Fields if you have many residents for which a status change is needed.)

For New Appointments:

- Enter Personnel Data as described in the [Field Ownership Responsibilities List](#) and [Required Field List](#) on the GME website. They must be in Personnel Data to begin this process.

Verifying the accuracy of this information first will make the rest of this process much smoother.

STEP 2: Review/Create/Edit Resident Records for Future Contracts

Information used to create future contracts is initiated from information contained in Personnel Data > Advancement Information. To access Future Contracts go to Personnel Data > Create/Edit/View > Future Contracts > [Selection Noted Below].

You will **create** the list of residents scheduled for future contracts using Create/Edit/View and/or Manage Contracts.

- **Create/Edit/View** allows you to:
 - Select residents individually who will be in your program during 2009-2010. You also can select residents who will be transferring into your program. (Note: It is

preferable for programs to use Advancement Information to indicate a new program prior to creating the future contract.) To add a resident to your list who is transferring from another VCUHS program, select their name from the drop-down list and change information as appropriate.

- Review your list of residents, and/or
- Make changes to and mark milestones for individual residents (Edit).

- You can create future contracts for groups of residents using **Generate Multiple**.
 - Select which residents need future contracts in your program.
 - At the bottom, select the appropriate Contract Type – “Intern”, “Resident”, or “Fellow”.
 - Hit “Create Future Contract”.
 - You can return to Create/Edit/View to edit any data or enter milestones or use Manage Contracts and make changes to a group of residents.

- **Manage Contracts** allows you to:
 - Review your list of residents (**Review**), and
 - Make changes to more than one resident record at a time (**Update Fields**)
 - To make changes:
 - Select Field(s) and/or Milestone(s) and enter appropriate new value(s),
 - Select residents to whom the change applies, and
 - Go to the bottom of the resident list and select “Update Selected Future Contracts”
 - Note: If you discover that the dates of a contract you have created are incorrect, you may correct using Create/Edit/View or Manage Contracts > Update Fields. You also will need to return to Personnel Data and correct dates in Basic Data and Advancement Information as appropriate.

- **Milestones**: Milestones are essentially tracking fields and can be edited individually (Create/Edit/View) or for more than one resident at a time (Manage Contracts > Update Fields). You will use these to provide us with the following information:
 - Promotion-Transfer – Residents promoting and transferring into your program. This should not be used for residents promoting within your program.
 - Incoming/New Housestaff
 - Into Research Yr - Residents going into a research (lab) year,
 - Remain In Research Yr – Staying in research (lab) year,
 - Out Of Research Yr - Residents completing a research (lab) year and returning to clinical duty,
 - Chief Resident - Residents who will be Chief Residents next year, and
 - UNDECIDED - Residents who are yet undecided about next year. For undecided residents, please enter a brief explanation in “Notes” to include reason and approximate date that you expect a decision to be made.
 - “Contract Sent” and “Signed by Resident” milestones will be entered by the GME Office.

Step 3: The GME Office will export the Future Contracts you have created and prepare the actual contracts for your residents.